

# Indiana Resource Sharing Manual

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## Part I: Interlibrary Loan Code for the State of Indiana

The Indiana State Resource Sharing Committee (ISLRSC), in conjunction with the Indiana Library and Historical Board (ILHB), has adapted the Reference and User Services Association's 2016 [Interlibrary Loan Code for the United States](#) (RUSA Code) for use by the libraries of the State of Indiana.

Adopted by ISLRSC, 3 March 2016

As outlined in the RUSA Code, "libraries have an obligation to obtain material to meet the informational needs of users when local resources do not meet those needs. Interlibrary loan (ILL), a mechanism for obtaining material, is essential to the vitality of all libraries." This code establishes principles that facilitate the borrowing and lending of interlibrary loan items in the State of Indiana.

Indiana libraries abide by the copyright laws of the United States, the [Policy concerning Confidentiality of Personally Identifiable Information about Library Users](#) adopted by ALA and related Indiana statutes (see *Supplemental materials* at the end of this document).

### 1.0 Definitions

- 1.1 Interlibrary loan is the process by which a library requests material from, or supplies material to, another library.
- 1.2 Materials are specific, identified items in any format in library collections, including returnable items (e.g., books and audio/visual items) and nonreturnable items (e.g., copies of articles and book chapters).

### 2.0 Purpose

- 2.1 The purpose of interlibrary loan as defined by this code is to obtain, upon request of a library user, material not available in the user's local library. Interlibrary loan is primarily intended to provide a requesting individual with a physical loan of a defined duration or a non-returnable copy or scan from another library.

### 3.0 Scope

- 3.1 This code regulates the exchange of material between libraries in the State of Indiana.
- 3.2 Interlibrary loan transactions with libraries outside of Indiana are governed by the [Interlibrary Loan Code for the United States](#).

- 3.3 Interlibrary loan transactions with libraries outside of the United States are governed by the International Federation of Library Associations and Institutions' [International Resource Sharing and Document Delivery: Principles and Guidelines for Procedure](#).

#### 4.0 Responsibilities of the Requesting Library (or intermediary)

- 4.1 Establish, promptly update, and make available an interlibrary borrowing policy.
- 4.2 Ensure the confidentiality of the library user.
- 4.3 Describe completely and accurately the requested material following accepted bibliographic practice.
- 4.4 Note any special requirements regarding the format needed, specified shipping address, or use to be made of the material on the request sent to potential supplying libraries.
- 4.5 Identify libraries that own the requested material. Check and adhere to the policies of potential supplying libraries.
- 4.6 When no libraries can be identified as owning the needed material, requests may be sent to libraries believed likely to own the material.
- 4.7 Transmit interlibrary loan requests electronically unless otherwise specified by the supplying library.
- 4.8 Comply with U.S copyright law (Title 17, U.S. Code) and be aware of related guidelines for copy requests.
- 4.9 Assume responsibility for borrowed material from the time it leaves the supplying library until it has been returned to and received by the supplying library. This includes all material shipped directly to and/or returned by the user. If damage or loss occurs, provide compensation or replacement, in accordance with the preference of the supplying library.
- 4.10 Pay promptly any service, replacement, or damage fees charged by the supplying library.
- 4.11 Assume full responsibility for user-initiated transactions.

- 4.12 Honor the due date and enforce any usage restrictions specified by the supplying library. Unless otherwise indicated, the due date is defined as the date by which the material is due to be checked in at the requesting library for return to the supplying library.
- 4.13 Request a renewal before the item is due whenever possible. If the supplying library does not respond, the requesting library may assume that a renewal has been granted, extending the due date by the same length of time as the original loan.
- 4.14 Respond immediately if the supplying library recalls an item. All borrowed material is subject to recall at any time.
- 4.15 Package material to prevent damage or loss in shipping and comply with any special instructions stated by the supplying library.
- 4.16 Failure to comply with the provisions of this code may result in suspension of service by a supplying library.
- 4.17 An Indiana requesting library is responsible for collecting and reporting statistics of its ILL transactions as required for those libraries that report to the Indiana State Library. Annual statistics must include number of requests sent to other libraries and number of items borrowed from other Indiana libraries and from out-of-state libraries.

## 5.0 Responsibilities of the Supplying Library

- 5.1 Establish, promptly update, and make available an interlibrary lending policy, contact information, and a service schedule.
- 5.2 Ensure the confidentiality of the library user.
- 5.3 If it is necessary to charge service fees, make available a fee schedule as part of an interlibrary lending policy. Bill any service, replacement, or damage fees promptly.
- 5.4 Consider filling all requests for material regardless of format or the collection in which it is housed.
- 5.5 Process requests in a timely manner, recognizing the needs of the requesting library and/or the requirements of the resource sharing system being used. If unable to fill a request, respond promptly and state the reason the request cannot be filled.

- 5.6 Send sufficient information to identify the particular request when filling or communicating about requests.
- 5.7 Indicate the due date, any restrictions on the use of the material, and any special return packaging or shipping requirements. The due date is defined as the date the material is due to be checked in at the requesting library for return to the supplying library.
- 5.8 Ship material by the fastest method reasonably available to the location specified by the requesting library. Package loaned material to prevent damage or loss.
- 5.9 Respond promptly to requests for renewals. If the supplying library does not respond, the requesting library may assume that a renewal has been granted, extending the due date by the same length of time as the original loan.
- 5.10 The supplying library may recall loaned material at any time.
- 5.11 Deliver copies electronically whenever possible. Provide complete and legible copies, and adhere to any special scanning instructions of the requesting library.
- 5.12 The supplying library may suspend service to a requesting library if it fails to comply with the provisions of this code.
- 5.13 The Indiana Standards for Public Libraries require public libraries to provide interlibrary loan free of charge (other than reimbursement for actual photocopy and postage or freight costs, if applicable).
- 5.14 An Indiana supplying library is responsible for collecting and reporting statistics of its ILL transactions as required for those libraries that report to the Indiana State Library.

## Part II: Statewide Remote Circulation System (SRCS) Policies

### 1.0 Definitions

- 1.1 SRCS is a system through which a library user places an unmediated interlibrary loan request to obtain material from a library other than his/her home library.
- 1.2 Materials are specific, identified, returnable items in any format in library collections (e.g., books and audio/visual items). Individual libraries may not lend all formats.
- 1.3 Providing SRCS service free of charge fulfills the Indiana Standards for Public Libraries requirement to provide interlibrary loan.

### 2.0 Purpose

- 2.1 The purpose of an unmediated interlibrary loan is to obtain, upon request of a library user, returnable material not available in the user's local library.

### 3.0 Scope

- 3.1 These policies regulate the exchange of material between libraries in the State of Indiana that participate in the Statewide Remote Circulation System (SRCS).

### 4.0 Responsibilities of the Library User (User)

- 4.1 Must hold a valid library card from a participating Indiana home library.
- 4.2 Must be flagged in their home library system as being in "good standing." Users whose library cards are "blocked" or "barred" will not be allowed to place requests until their card privileges are restored.
- 4.3 Must be authorized to log in and use the SRCS system, or to request materials via local library system that has been connected to SRCS.
- 4.4 Must return the materials to the library where they were picked up.
- 4.5 May have a maximum of 20 unfilled holds in the system.
- 4.6 Must accept the responsibility to pay for any loss or damage to borrowed materials.

## 5.0 Responsibilities of All Participating Libraries

- 5.1 Provide basic interlibrary loan service to other SRCS members at no charge.
- 5.2 Make their local collection visible in the SRCS Catalog, either by direct access to the local catalog or maintaining current holdings in the SRCS Union Catalog.
- 5.3 Provide a contact person who can work with the vendor to load or map their data in the SRCS software.
- 5.4 Make materials in their general, circulating collection available for interlibrary loan.
- 5.5 Ensure SRCS settings reflect current lending policy. Relevant settings include 1) Z-39.50 mapping, 2) Participant Record, 3) union catalog holdings.
- 5.6 Review [Recommended/Default Settings for Participant Record](#) and adjust settings as necessary.
- 5.7 Provide staff to respond to SRCS requests in a timely fashion.
- 5.8 Subscribe to at least one-day-a-week courier service via InfoExpress.
- 5.9 Maintain current contact information for at least one staff member on the SRCS Participant Record.
- 5.10 Subscribe at least one staff member to the [IN-SRCS listserv](#).
- 5.11 Participate in continuing education about interlibrary loan and/or SRCS as needed.

## 6.0 Responsibilities of the Supplying Library

- 6.1 Loan materials for a minimum of 21 days, with two (2) renewals. The loan period begins when materials are checked out by the user, not when checked out in the supplying library's system.
- 6.2 Agree not to levy daily fines for interlibrary loan materials supplied through SRCS.
- 6.3 Agree that charges for lost or damaged materials may not exceed those charged to the library's regular users.

6.4 Provide a contact person to work with the user's home library in the event materials are lost or damaged.

6.5 Recalls are allowed, but not encouraged.

## 7.0 Responsibilities of the User's Home Library (Requesting Library)

7.1 Receive and check in all requested materials.

7.2 Notify patron and place on hold shelf.

7.3 Allow users a minimum of one week after notification to pick up items.

7.4 Individual libraries may impose a fee for failure to pick up a hold.

7.5 Check out requested materials, provided that the user's card is not "blocked" or "barred" in the local ILS.

7.6 Honor the due date and enforce any use restrictions specified by the supplying library. The due date is defined as the date the material is due to be checked in at the home library for return to the supplying library.

7.7 Check in and prepare returned materials for shipping to supplying library in a timely fashion.

7.8 Provide a contact person to work with the supplying library in the event materials are lost or damaged.

## Part III: Indiana Share Policies

### 1.0 Definitions

- 1.1 Indiana Share is a system through which participating libraries may place mediated interlibrary loan requests on behalf of their users.
- 1.2 Materials are specific, identified items in any format in library collections, including returnable items (e.g., books and audio/visual items) and nonreturnable items (e.g., copies of articles and book chapters).
- 1.3 Providing interlibrary loan service via Indiana Share fulfills the Indiana Standards for Public Libraries requirement to provide interlibrary loan.

### 2.0 Purpose

- 2.1 The purpose of Indiana Share is to facilitate interlibrary loan borrowing for libraries that would otherwise be unable to provide such a service.

### 3.0 Scope

- 3.1 These policies define the eligibility requirements and expectations of libraries participating in the Indiana Share service.

### 4.0 Requirements for Indiana Share Members

- 4.1 Eligibility limited to Indiana-based public libraries (limited to one location per institution), school (K-12) libraries, or special libraries.
- 4.2 Subscribe to at least one-day-a-week courier service via InfoExpress.
- 4.3 Participants must not be using any other automated ILL system (e.g. Docline, OCLC ILL). SRCS participation is acceptable and encouraged.
- 4.4 Libraries are encouraged to have a plan in place to become self-sufficient for resource sharing.
- 4.5 Libraries that end subscriptions to an automated ILL system and/or OCLC cataloging in order to join Indiana Share will be expected to share the costs of the program by paying a minimum of \$5 for each request submitted.

- 4.6 Libraries participating in Indiana Share agree that they will NOT charge back to the user for the cost of the service. *The presence of any charges for interlibrary loan service, other than reimbursement for actual direct photocopy and postage costs by any Indiana Share member is cause for immediate dismissal from the program.*
- 4.7 Libraries should search and fill requests locally or through other resource sharing agreements (SRCS, for example) whenever possible before requesting through Indiana Share.
- 4.8 Maintain current contact information within ILLiad.
- 4.9 Provide information on Received/Returned status of requested items to [share@library.in.gov](mailto:share@library.in.gov), so that ISL staff can update the lenders via ILLiad. This should be submitted at least weekly, unless no items are received or returned. A template is provided at <https://www.in.gov/library/services-for-libraries/ishare/>.
- 4.10 Participate in continuing education about interlibrary loan and/or Indiana Share as needed.

## 5.0 Request Limits and Fees

- 5.1 Starting July 1, 2017, participants will be billed \$5 per request on a quarterly basis for the cost of each Indiana Share request submitted which is over their borrowing limits threshold.
- 5.2 As of July 1, 2017, the borrowing limits thresholds are as follows:

<b>Library Type</b>	<b>Free Request Limit</b>
Academic	0
School	250
Class A Public	0
Class B Public	250
Class C Public	250
Out of Standards Public	0
Corporate/For-Profit	0
Institutional/Governmental	250

- 5.3 Book Club requests (requests for multiple copies of the same book, placed at the same time) will be counted as a single request, not as individual requests.
- 5.4 The borrowing thresholds and costs will be reviewed and revised by the State Library, if necessary, every two (2) years.

## Part IV: Supplemental Materials

- [Interlibrary Loan Code for the United States](#)
- Copyright laws of the United States
- [Policy concerning Confidentiality of Personally Identifiable Information about Library Users](#)
- Related Indiana statutes, including [Public Library Standards](#)